

# **PROCEDURES FOR PARTICIPATING IN RETIREMENT INCENTIVE PROGRAM**

**November 1, 2002 – June 14, 2003**

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## **Chronology for Employee considering program:**

1. Local/ Agency Human Resources Office provides Employee with PERF Request for Estimate of Benefits Form or TRF Request for Estimate of Benefits Form. Local/ Agency Human Resources Office verifies records on employment with State of Indiana and identifies dates of state employment in appropriate lines on Form.
2. Employee completes PERF Request for Estimate of Benefits Form and submits completed Form to PERF – Attention Marty Montgomery. Or Employee completes TRF Request for Estimate of Benefits Form and submits completed Form to TRF – Attention Suzie Sellers. (Do Not Send these forms to the State Personnel Department)
3. PERF or TRF processes Forms and returns Estimate to Employee.
4. Employee decides whether to participate in program.

## **Chronology for Employee who has decided to participate in program:**

5. Employee shall then submit to State Personnel Department the completed State of Indiana Retirement Incentive Election Form. You may submit a personal Letter of Resignation with a date certain that falls within the time frame of this program (November 1, 2002 to June 6, 2003 (A Payroll) or June 14, 2003 (B Payroll)) or use the form provided. *In order for an employee to be eligible under this program, the complete Retirement Incentive packet must be postmarked no later than **February 28, 2003.***
6. If Employee wishes to apply for pension benefits, Employee must identify intent to apply by marking the appropriate line in the State of Indiana Retirement Incentive Election Form. Application Packets are available from your Local/ Agency Human Resources Office and should be marked with the acronym **SRIP** (State Retirement Incentive Program) on the top of the first page.
7. Employee must then complete the Application for Pension Benefits packet provided by PERF or TRF, marked with “SRIP” on the first page, and submit the completed forms to State Personnel Department – Attention Erica Hewlin along with the Retirement Incentive Election Form. This ensures that your retirement packet is processed as part of this special program. **ALL**

verifications required by the Employer must be completed by the Local/ Agency Human Resources Office prior to submission of the forms.

8. PERF or TRF will process Application and pension benefits will begin.

### **Questions**

Questions about creditable service, pension benefits and options should be directed to PERF Call Center at 1-888-526-1687 toll free or to 233-4162 locally.

Questions about creditable service, pension benefits and options should be directed to TRF Call Center at 1-888-286-3544 toll free or to 232-3860 locally.

Questions about eligibility for the Retirement Incentive Program should be directed to State Personnel Department – Labor Relations Division at 317/ 232-3080.